Michigan Office of Financial and Insurance Services
How to Report Education Classroom Course Schedules
(March 2003)

All providers must report classroom schedules to the Michigan Office of Financial and Insurance Services (OFIS). **The course must be approved and active at the time of submission.** Course schedules must be (1) reported on a monthly basis, (2) due by the first of every month, and (3) at least 30 days in advance of the course offering. These will form the basis for in-person, on-site audits to be conducted by OFIS and/or its designee. All course offerings must be submitted via computer diskette or e-mail.

The recommended file format is a spreadsheet program in Excel or any other programs compatible with Excel Office 2000. Should you not have available a spreadsheet program, you may type the information exactly as described in the samples below on a blank document. If the information is prepared in Excel, no punctuation is necessary and the required fields must go across the page. However, you must still select the Save As TYPE option to Text (tab delimited) to submit the schedule to OFIS. Do not send the excel spreadsheet itself. (See attached document to format cells and/or Save As Type selection.)

When typing these records in Microsoft Word or other word processing programs, the data must be saved as a Text (.txt) extension. In other words, once you have prepared your information and are ready to save the information for transmission, it is necessary to select the "Save As Type" option to "Text Only". If you use a word processing program, please test prior to sending the data to OFIS by opening the document in Notepad or some other basic text editor, but not Microsoft Word.

Regardless of the file format you choose, always save the file in a Tab delimited (.txt) text extension format or a Comma delimited (.csv) extension format. Using a spreadsheet program makes it easier to see the alignment of the data in columns and to copy repetitive data. We will accept either Tab delimited or Comma delimited ASCII text files.

Multiple entries can be submitted on one file. Please be sure to always begin the next course schedule information on a new row or line. Do NOT put any blank lines between each entry. In other words, immediately following the answer to the last question, "Y" or "N" if the CE course is part of another program, hit your "enter" key on your keyboard one (1) time and begin typing the next course schedule. See examples below.

Global rules, required data and definitions:

(1)   All data fields must be submitted in the exact order as described below and entered across the page.

(2)   Once the data is prepared, you must select the SAVED AS TYPE either as (.txt) Text extension (Tab delimited) or (.csv) Comma delimited extension.

(3)   Do not add any type of punctuation within each field. If the location of course is being held in at a particular suite or floor, submit the information in the location field as follows: "Office of Financial and Insurance Services STE 101" or "OFIS 2nd Floor".

--Record type must be specified, i.e., N (New); R (Revision) to a course schedule already submitted;
  or C (Cancellation) of a course schedule already submitted (1 character)
--Provider identification number (4 digits)
--Provider name (35 characters)
--Approved hours (2 characters)
--Course identification number (5 characters)
--Course name as approved (35 characters)
--Start date (use format mm/dd/2000, including slashes)

--End date (use format mm/dd/2000, including slashes)
--Location (provider's office, building name, floor number, and/or suite number)
--Street address
--City
--State (2 character abbreviation)
--Zip code (5 characters)
--Start time (8:00 a.m., 3:00 p.m.)
--End time (9:00 a.m., 4:15 p.m.)
--Enter Y or N if any Michigan agents are registered for the course (1 character)
--Estimated number of attendees
--Enter Y or N if the approved program is part of any other program offered the same day (1 character)
--E-mail address of contact person

Examples of field entry:

COMMA DELIMITED:
"N","0123","ABC Company","2","12345","Annuities","01/05/00","01/05/00","Eagle Towers STE 200","123 Main Street","Lansing","MI","12121","2:30 p.m.","4:30 p.m.","Y","10","N","jtester@abc.net"

EXCEL SPREADSHEET
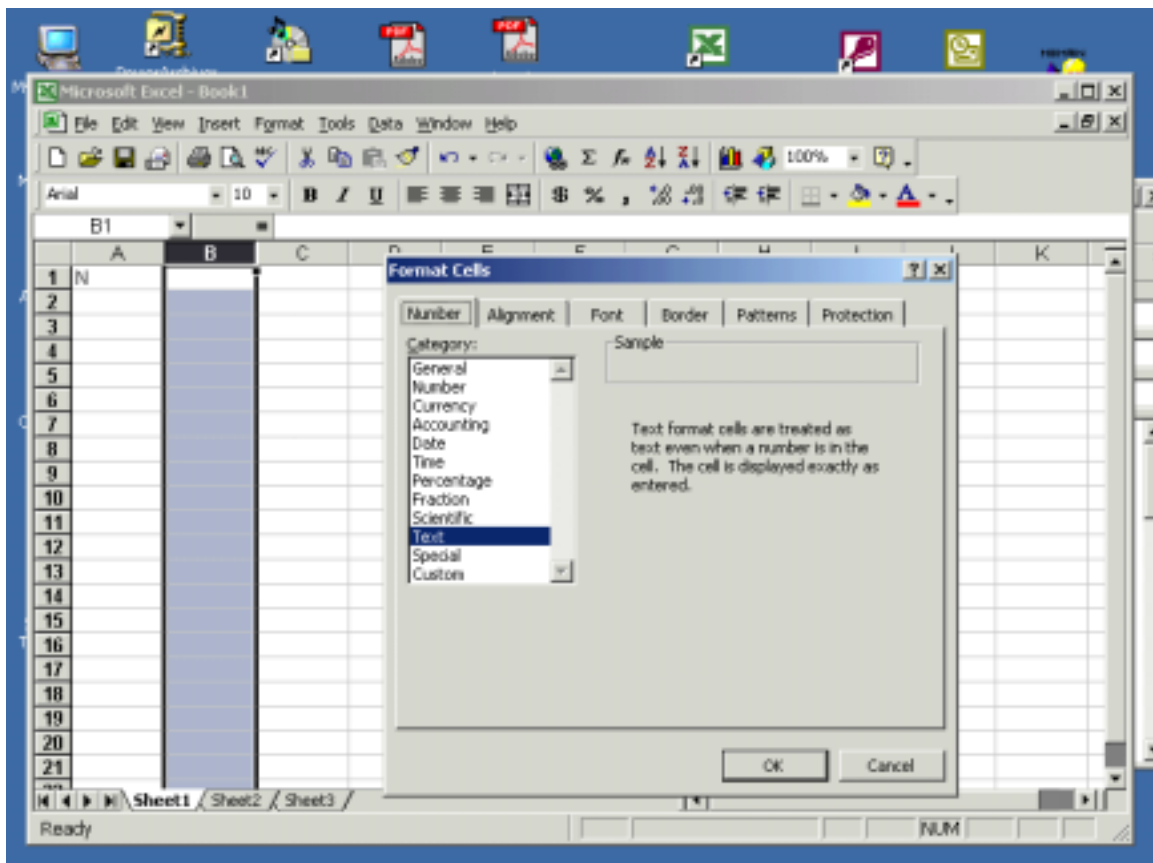
Open new spreadsheet. Highlight cell B; RT mouse click; select Number from Menu bar; select text; select OK. This will allow you to add "leader zeros", e.g., 0023.

Begin typing across the page with each required field in each cell, see below example. Continue to type all 19 required fields in each cell. No formatting is necessary. Start the next course schedule in row 2, cell A and continue to go across the page; row 3 cell A for the third course schedule, etc.
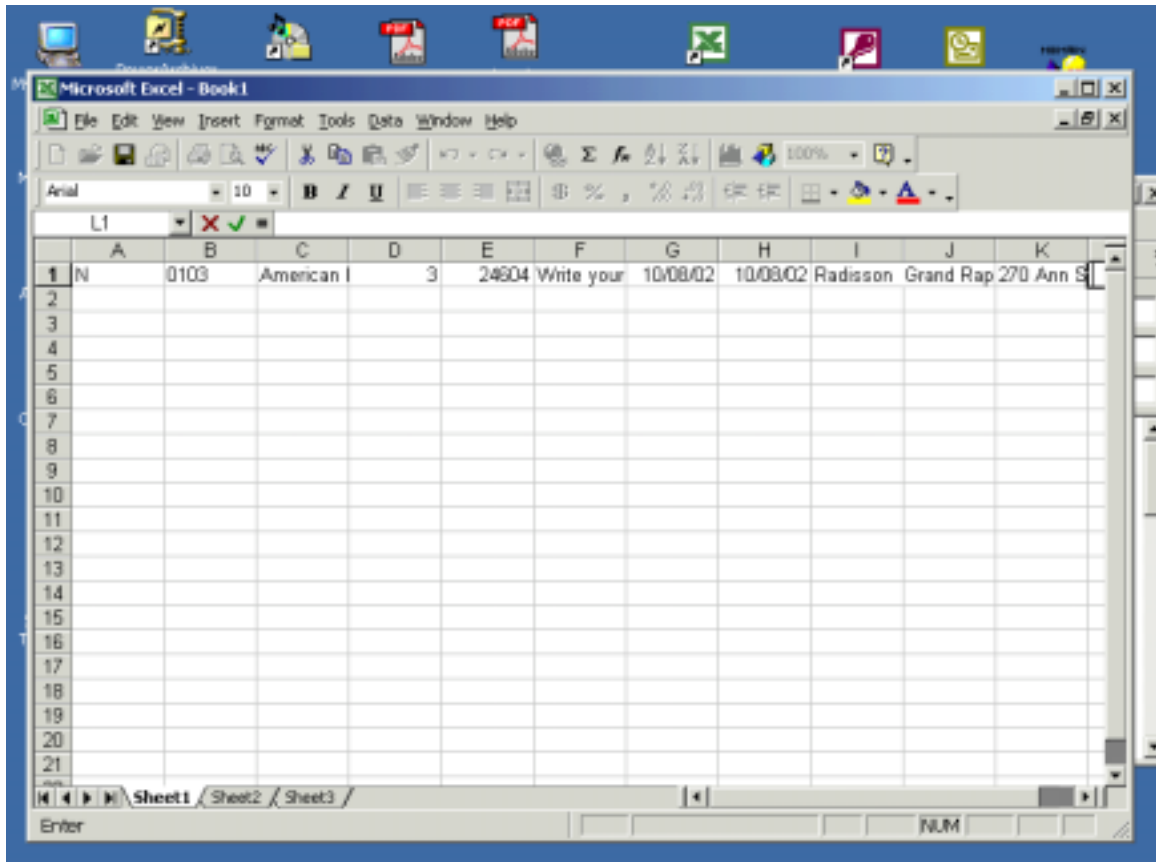
Once the provider's designated contact person's e-mail address is typed, do not go to the next row. In other words, save immediately upon typing the e-mail address. See example below to convert the spreadsheet into a text document. Select the "Save as type" for either tab delimited or comma delimited from the drop down menu and name the file "Crs, Your Prov #, and the month of course offering, e.g., crs0020Mar.txt before closing the file.
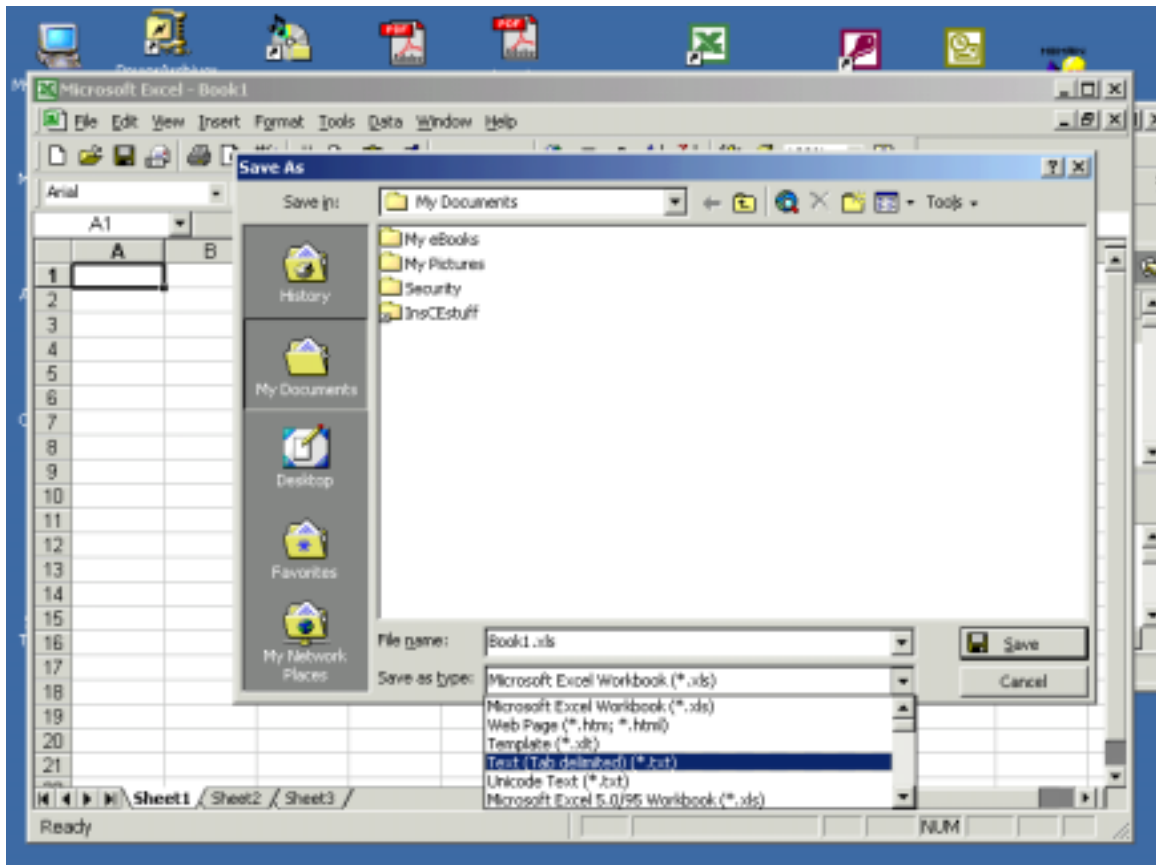
Once the document is saved. Close it. Prepare an e-mail message to Mbukos@Michigan.gov; attach the saved document to the e-mail; open to test the document to assure that it can be opened; then send.